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Regional Network for the Production,
Marketing and Control of Pesticides
in Asia and the Pacific
DP/RAS/82/006

Expert Consultation on Pesticide
Trade and Tariff Considerations

Colombo, Sri Lanka 13-17 August 1984

REPORT*

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INTRODUCTION

1. The Regional Consultation on Pesticide Trade and Tariff Considerations organized by the United National Industrial Development Organization in cooperation with the Ministry of Agricultural Development and Research, Government of the Democratic Socialist Republic of Sri Lanka was convened at the Natural Resources Energy and Science Authority Auditorium, Colombo, Sri Lanka from 13 to 17th August, 1984.

2. The Expert Consultation was organized to implement one of the activities under the work programme approved by the Technical Advisory Committee(TAC) of the Regional Network Project. The meeting had the following objectives:

   2.1. To review current trade practices and tariff regulations relative to technical pesticide materials, chemical intermediates and raw materials, formulated products, anxiliary chemicals, etc.;

   2.2. To identify factors which inhibit intra-regional trade on pesticides;

   2.3. To identify tariff policies which favour importation of formulated pesticides and active ingredients from the international market whereby affecting the development of local production for which unfavourably taxed imported materials are required;

   2.4. To consider and recommend measures to overcome current impediments to intra-regional trade and to remove unfavourable custom duties;

   2.5. To identify specific areas of cooperation in this field which would encourage, facilitate and strengthen trade among Network member countries in the Region.

3. The meeting was attended by 9 delegates representing six member countries, 2 resource persons, one International Consultant, one from the Regional Coordination Unit, 4 representatives from UN Agencies - FAO, WHO, ITC and UNIDO and 10 Observers from Trade and Industry and also concerned institutions of Sri Lanka. No participants attended from Thailand, Bangladesh and Afghanistan. The list of participants is attached as Appendix I.

4. The proceedings of the meeting are summarized below:

OPENING OF THE MEETING

5. Mr. Dixon Nilaweera, Additional Secretary, Ministry of Agricultural Development and Research inaugurated the Expert Consultation

on Pesticides Trade and Tariff on behalf of the Deputy Minister of Agricultural Development and Research. He extended warm welcome to all present.

6. He indicated that countries in the region had several common and binding factors. As nations of Asia and the Pacific basic problems of development were by and large similar. The agricultural background of our respective countries too was a common link. Further as members of the Regional Network on Production, Marketing and Control of Pesticides we were further bound together.

7. He emphasized that inter-country cooperation was the only way to strengthen and support the expansion and improvement of the Pesticide Industry in the region. This work entailed evaluation and adoption of appropriate technology for production with available raw materials and packaging within the region, adoption of quality control procedures so that the products formulated in our countries would conform to international standards.

8. He gratefully acknowledged the lead role played by the UN System; financially assisted by UNDP. UNIDO, FAO, ESCAP, WHO, UNEP and ITC were closely affiliated in promoting network activities. He realized that one of the key issues would be agreements on trade, tariff and marketing of Pesticides. He enjoined the participants to examine in-depth current tariff and trade policies in the respective countries and find ways and means of increasing the flow of trade. He hoped that they would be able to identify the impediments for intra-regional trade and to suggest methods of improving the existing situation.

ELECTION OF OFFICERS

9. The Meeting elected the following officers:

Mrs. Nallini de Alwis (Sri Lanka) was elected Chairman

Mr. S. Ghosh (India) Vice Chairman, and

Mr. G. S. Sandhu (India) Rapporteur for the meeting.

ADOPTION OF AGENDA

10. The meeting adopted the Agenda as presented in Appendix 2.

PRESENTATION OF COUNTRY PAPERS

11. The 6 participating countries in the Consultation presented their Country Papers covering therein the various aspects of Trade and Tariff Considerations. The summary of each of the Country Papers are enclosed as Appendix 3.

REPORTS FROM UN AGENCY REPRESENTATIVES

12. The UNIDO Consultant Mr. Roy F. Pavey thereafter presented his paper on I.T.C. wherein he dwelt upon the role of International Trade Centre in assisting the developing countries to promote trade by offering appropriate training programmes in export promotion including those of pesticides, in providing information on requirements of various pesticide production and related matters. He informed the Consultation about the World Pesticide Trade. He highlighted that pesticide business is highly research oriented and has a high rate of obsolescense which requires constant user training and use-awareness. He also highlighted the fact that world wide there is high degree of competition obviating shortages and that the cost of pesticides usage is small in comparison to the total input costs incurred for agricultural production. He mentioned of the high risk and high investment involved in discovery of newer products and the fact that all these factors make pesticide business a very dynamic one.

Mr. Pavey mentioned the efforts made by Customs Cooperation Council to harmonize the nomenclature and the role of GATT. He stated that tariff structure is an ongoing evolutionary process needing constant commodity-wise review. The summary is presented as Appendix 4.

13. The FAO Delegate Dr. W. L. Zhu in his comments highlighted that pesticides should be available at reasonable prices to farmers and that manufacturers must be aware of the pest situation. He emphasized the need for technical cooperation among developing countries and suggested that there is scope to adopt TCDC in this region. He mentioned that FAO would like greater involvement in the network activities on the subject of pesticides on the same lines as FAO has been involved in fertilizers.

STATE OF TRADE PRACTICES AMONG MEMBER NETWORK COUNTRIES

14. Mr. G. S. Sandhu who was designated by the Network as Resource Person on the subject then presented his background paper based on his study tour to some of the member countries. In his paper he presented information on the country wise status of the trade and tariff pertaining to the pesticide industry, the present trade and tariff practices and highlighted the various factors that affect the trade in pesticides amongst the countries of the region. He observed that what was needed was removal of non-tariff barriers to enhance pesticide trade. He also mentioned that India and Republic of Korea have a well developed pesticides manufacturing base and could offer their products and technologies to various countries within the region. Report is presented as Appendix 5.

FACTORS AFFECTING TRADE IN PESTICIDES AND MEASURES TO ENCOURAGE INTER-REGIONAL TRADE

15. The Consultation identified tariff and non tariff barriers as important factors affecting trade. Mrs. C. Azarcon, the resource person from

the Philippines submitted information of official tariffs in the region. A disparity in tariff structures was evident in the region but these were dependent on policies of indivudual governments. The source is indicated in Appendix 6. Nevertheless, import tariffs per se were really not the key constraint in promoting/enhancing the flow of trade. The non-tariff barriers requiring immediate attention were the specific regulatory requirements prevalent in the individual member countries; lack of relevant data on supply and demand of pesticides in the region; and the financial and economic constraints within the region:

Tariffs and Import Duties

15.1. The Consultation advised the member countries to review periodically import tariffs on pesticides,to ensure that they do not become a disincentive for local production. In cases where higher import tariff are levied on technical compounds , intermediate or raw materials compared with the finished pesticide products, in which they are used, steps should be taken to rectify such anomalies.

Registration Requirements and Procedures

15.2. The participants noted that the present registration procedures adopted by various countries inhibit pesticide trade and emphasized the need for countries of the region to adopt a harmonized system of registration which would permit transportability of data to expedite the registration process in member countries wherever practicable.

RECOMMENDATIONS

The Consultation

Having recognized the need for harmonized registration requirements and procedures,

Noting the commitment of member countries to the concept of international harmonization of Pesticide Registration procedures,

Recommends that the recommendations of the Consultation on harmonization of pesticide registration requirements held in Baguio City (Philippines) in October 1983 be implemented at the earliest.

Further noting that FAO has the responsibility to provide harmonized procedures for pesticide registration such as, but not limited to, bio-efficacy, residues, packaging and labelling, product specifications, analytical testing procedures, etc.

Recommends that FAO assist in enhancing the intra regional pesticide trade by providing technical and financial support to harmonize pesticide registration systems.

Data Collection and Information Exchange

15.3. The consultation noted that a serious data gap exists on the country-wise requirements of pesticides of the importing countries on the one hand and the availability of such products in the exporting countries of the region on the other.

RECOMMENDATIONS

Having recognized the need for reliable data and information on pesticide imports/exports, production, tariff structures and trade practices, and that considering there exists a regional scheme for collection of data and information exchange; -

Urges that the recommendations of the Expert Group Meeting on Pesticides Data Collection System held in Chiangmai (Thailand) in March 1983 be expeditiously pursued and the regular exchange of this information on an annual basis be encouraged.

Further noting the need for timely dissemination of information among member countries of the Network.

Further recommends that member countries of region submit the required data to the Regional Coordinator before the end of August of each year and that the information so collected be collected be circulated before the end of each year to all member countries.

Further recognizing that a Coding System would greatly help the member countries for data collection on imports/exports.

Further recommends that UNIDO circulate detailed information on the CCCN harmonized system, and SIFC pertaining to pesticides as it exists presently for the information and use of the member countries.

CONCLUSION AND GENERAL RECOMMENDATIONS

16. The consultation recognized that a greater portion of the inhabitants in the region are dependent on agriculture and agro-based pursuits and that agricultural development is a key section for developing of the economies of countries in the region. Pesticides are an essential input in the future. Their availability had to be ensured.

RECOMMENDATIONS

The Consultation -

Having examined the current status of the industry in the region, and

Noting that certain countries of the region would have to continue the import of pesticides presently due to various factors;

Recognizing that other countries of the region have pesticide manufacturing facilities with capacities to export their products;

Recommends that greater trade in pesticide among the coutries of the region must be encouraged and all efforts made to remove the constraints that hamper the possible enhanced trade in pesticides,

Further noting that in view of the increasing use of pesticides in the countries of the region, necessary formulation/technical grade production capacities would have to be created in due course in almost all countries of the region.

Further recognizing that there would be need to obtain the required technical expertise and know-how for building such capacities;

Further recommends that an agency be nominated by UNIDO as the "Clearing House" for providing such expertise/know-how by compiling information on availability of such technical expertise and know-how within the countries of the region and that inorder to be an effective "Clearing House", the nominated agency collect all such information on available expertise from the various countries of the region.

17. The Consultation noted that in certain cases, prices of popular branded products appear to be higher when compared to prices of the same product manufactured by other companies in the region. It was suggested that importing countries consider the possibility of purchasing commonly used pesticides from within the region provided these are available at competitive prices, terms and conditions.

CLOSING OF THE MEETING AND ADOPTION OF THE REPORT

18. The Chairman summarized the proceedings and recommendations of the meeting and finally closed the Consultation after the Report was adopted as amended.

APPENDIX 1

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APPENDIX 2

A G E N D A

1. Opening of the Consultation
2. Election of Chairman/Appointment of Rapporteur
3. Adoption of Agenda
4. Presentation of Country Paper
5. Status of trade prcatices among member countries of the Network

   5.1. Current tariff duties and taxes on imports of pesticides

   5.2. Present sources of imports of pesticides

   5.3. Present types and volumes of pesticides offered for export

   5.4. Incentives for exports of pesticides.

6. Factors affecting trade among countries in the Region
7. Measures to encourage intra-regional trade
8. Proposed follow-up activities for the sub-network on Trade and Tariff
9. Other business
10. Adoption of the Report
11. Closing Session.

SUMMARY OF COUNTRY PAPER - INDIA

1. PRODUCTION

1.1. India produces 48 technical grade pesticides and a range of 122 formulations. The total installed capacity of technical material is 1,005,606 tonnes. Encouragement is given to the development of the indigeneous pesticides industry from the basic stage in a phased manner. The major raw materials are indigeneously available.

1.2. There are more than 500 formulations units: many of the solvents, emulsifiers, etc. are locally available.

2. DEMAND

The estimated demand for technical grade pesticides in 1984-85 is 99,216 tonnes. This is expected to go up to 1,019,172 tonnes by 1989-90.

3. AGENCIES RESPONSIBLE FOR IMPORT/EXPORT

The chemicals and Fertilizers Ministry is the nodal agency for manufacture of pesticides and is closely associated in determining import/export policy. The other concerned agencies are Ministries of Commerce, Agriculture and Finance.

4. IMPORT/EXPORT POLICY AND TARIFF REGULATIONS

Import/Export Policy is basically determined with reference to indigeneous availability. Positive encouragement is given to exports through a system of duty drawbacks, cash incentives, facility of imports up to a certain percentage against exports made, establishment of units in free trade zones, etc.

5. IMPORTS/EXPORTS

5.1. India's imports of pesticides are mainly in respect of technical grade pesticides, not fully developed indigeneously. In 1983, total value of imports came to $25 million dollars.

5.2. India's exports are gradually increasing. In 1983, total value of exports came to $5.6 million. India has a large potential for export, having surplus installed capacities for certain technical grade pesticides and formulations. India has also imbibed necessary technology and know-how for manufacturing these and can play a significant role in

transfer of such technologies.

6. SUGGESTIONS

6.1. There should be sufficient exchange of all relevant informations and establishment of a strong data collection system. Countries in the region could give to one another advance information of their requirements, preferably in generic names.

6.2. There is need to follow-up on harmonization of registration procedures.

SUMMARY OF COUNTRY PAPER - INDONESIA

- The policy of the Indonesian Government in Agricultural Sector represents still top priority for the sunning development programme.

- The pesticide market could be divided into 2 main groups namely :

  1. Government Food Production Project (BIMAS/INMAS)which accounts 75% of the total market ;

  2. Free market (non BIMAS/INMAS) accounts the rest 25%.

- The authorized institutions to organize distribution is the Ministry of Trade, which regards pesticides as a vital commodity in the same rank as rice, sugar, baking oil, fertilizers, etc.

- The Ministry of Agriculture, who plans and executes the Food Production Projects, submits its pesticide requirements of each 2 planting seasons (2 times 6 mos.) in advance. Priority is given to product locally formulated. In the end the government enterprise PT Pertani acts as a sole distributor starting from the site of the formulation plant up to the supply into the village co-operative units and retailers. The same goes for imported pesticides which could not be formulated yet domestically.

  These pesticides are heavily subsidised so that the farmers pay only Rp 1500/per liter/kg all over the country. These sale price are determined by the Ministry of Finance. The same accounts for the buying price from the suppliers/ formulators.

  The Free Market mainly supply the demands of large estates, Horticulture crops and hygiene and household needs. Distribution prices are mechanized by the market.

  As mentioned earlier, the supply mainly comes from local formulators which in total have approximately 112.530 ton/ kilo liter per year. The utilized capacity is roughly one third. The active ingredients are mostly imported from various countries.

  In order to be more independent domestically, the Government has licensed 7 companies to build-up active ingredient manufacturing plants. This year a government owned plant will go on stream manufacturing Diazinon, BPMC, MIPC and Phenthoate.

Another important institution is the Pesticides Committee, whose function is to register the pesticides use, labelling and packaging. Registration permits is obligatory for the imports production and distribution of a pesticide.

In order to have a better supervision on the import of active ingredients as well as the formulated products, licensed importers has been appointed which includes the formulators.

IMPORT AND SALES TAX

The duty tax read as follows:

CCCN	% IMPORT DUTIES	% IMPORT SALES TAX
29.07.500	1.5	1.5
29.14.100	1.25	1.25
38.11.925	2.5	2.5
38.11.925	6.-	1.5
38.19.990	2.5	2.5

The present sales tax will be replaced by a value added tax amounting 10% starting latest 1986.

SUMMARY OF COUNTRY PAPER - PAKISTAN

1. Manufacture, distribution and use of pesticides in Pakistan is governed by the Pesticide Ordinance 1971 and the Pesticides Rules 1973 made thereunder.

2. Import and Export of Pesticides is regulated and controlled through the Import and Export Policies announced by the Government for each financial year which starts from July and ends on 30th of June.

3. Customs Duty and Sales Tax is levied by the Central Board of Revenue which is working under Ministry of Finance.

4. Tariff rates on import of Pesticides are as under : -

	Sales Tax	Customs Duty
i. Technical grade Pesticides	10%	nil.
ii. Chemical intermediates used for manufacture of technical grades	10%	nil.
iii. Solvents, emulsifiers, adjuvants etc. required for formulators	10%	nil.
iv. Pesticides formulation	nil	nil-

If pesticides are imported in finished form, there is no Customs Duty or sales tax.

A surcharge of 5% is levied on all imports in Pakistan.

5. In accordance with import policy, only registered Pesticides are allowed to be imported on the recommendations of concerned Provincial Governments.

6. The basic insecticides/pesticides manufacturing industry is practically non existent in Pakistan. However, DDT & BHC are being manufactured by two Public Sector Agencies. With annual production capacity of 1,320 m.tons and 1,380 m. tons per annum. Due to lack of demand,

both the factories are almost closed down. If there is demand for exports, these can be made more operational.

7. PESTICIDES OFFERED FOR EXPORT

BHC 1,000 tons

DDT 1,500 tons

8. Pesticides exported after importing active ingredient and granulating it locally -

Diazinon 10% ... 18,700 tons

Diazinon 5% ... 11,640 tons

9. IMPORT REQUIREMENTS

M. Tons

	1983	1984	1987
Technical Grade	316	1,500	2,500
Chemical Intermediate	-	-	-
Pesticides formulations	6,003	7,167	10,000
Solvents, emulsifiers & adjuvants	107	150	830

10. Countries where pesticides imported from -

West Germany, Japan, USA, U.K., Italy, Switzerland, and Netherlands.

11. Lack of information from the regional countries and registration procedures are the main constrains.

12. Exchange visit to introduce the pesticides which are manufactured in the member countries.

SUMMARY OF COUNTRY PAPER - PHILIPPINES

1. Authority responsible for import/export regulations and tariff policies on pesticides and the role of each agency;

   a) Tariff Commission

   b) Fertilizer and Pesticide Authority - regulatory agency in charge of all pesticide activities.

2. Government policy and regulations in respect of import/export of pesticides and whether regulations are oriented to serve national policy objectives. If so, details thereof ;

   FERTILIZER AND PESTICIDE AUTHORITY

   a) Presidential Decree 1144:

   "No pesticides, fertilizers, or other agricultural chemical shall be exported, imported, manufactured, formulated, stored, distributed, sold or offered for sale, transported, delivered for transportation or used unless it has been duly registered with the FPA or covered by a numbered provisional permit issued by FPA for use in accordance with the conditions as stipulated in the permit. Separate registrations shall be required for each active ingredient and its possible formulations in the case of pesticides or for each fertilizer grade in the case of fertilizer."

   " No person shall engage in the business of exporting, importing, manufacturing, formulating, distributing, supplying, repacking, storing, commercially applying, selling, marketing, of any pesticides, fertilizers and other agricultural chemicals except under a license issued by the FPA."

   b) All imports/exports of pesticides must be covered by an appropriate FPA permit. Requirements are attached as per pesticides Circular No. I Series of 1981.

3. Present duties/taxes imposed on import of pesticides;

(Please see annex B)

4. Types and volume of pesticides that can be offered for export;

So far only 2,4-D technical (minimal volume) and small quantities of excess production of finished producted like Butachlor, Marshal, Carbofuran, etc.

5. Present major exports indicating names of importing countries and whether any of these are under special aid programmes with details thereof - Not Applicable

6. Presnet cources of major import indicating whether any of these are under special aid programmes with detials thereof;

Major sources - multinational companies with local subsidiaries (Shell, Bayer, Hoechst, Ciba-Geigy, Rhone-Poulenc, Rohm and Haas, Du Pont, Monsanto, FMC, Velsicol, etc.)

Also lately, imports of technical materials came from Israel, Italy, Taiwan, Korea.

7. Incentives given by government in respect of exports of pesticides;

None.

8. Identification of factors that may inhibat inter-regional trade in pesticides;

a) Different registration requirements in each country

b) Specific tie-ups (prices, rebates) between local companies and supplier

c) Brand/quality consciousness.

d) Protectionism for local manufaturer/formulator specifications, as for example high tariff and duties for imported pesticides completing with locally produced ones.

9. Suggestions for encouraging inter-regional trade among member countries;

a) Harmonize registration requirements including bioefficacy trials, labeling and specifications.

b) Better and continues flow of information among countries.

SUMMARY OF COUNTRY PAPER - REPUBLIC OF KOREA

August 14, 1984

RE: Executive Summary.

1. Authorities and agencies of responsible for import/export regulations.
   1.1 Ministry of Trade
   1.2 Ministry of Agricultural and Fishery
2. Government policy and regulation

   All pesticides can be imported provided that Government Authorities approved and registered.
3. Present duties/taxes
   3.1 Pesticides and for pesticides registered and listed; 0%
   3.2 Not registered; 20%
4. Major pesticides technicals that can be offered;
   BPMC, MIPC, PAP, Parathron, DDVP, EPN, Trichlorfon, Diazinon, Demeton-Methyl, Pyridaphenthion, Endosulfan, IBP, Difolatan, Isoprothiolane, Thiophanate-Methyl Sankel, Butachlor, Alachlor, Paraquat and others.
5. Exporting countries; USA, West Germany, France, Italy, Iran, Indonesia, India, Thailand, Malaysia, Japan, Kenya, Philippines, Taiwan.
6. Imports from ; USA, West Germany, France, Japan, Italy, Netherland and Others.
7. No special aid programme.
8. Identification of factors.
   8.1 Unsuitable registration procedure
   8.2 Lack of information in intra-regional trade.
9. Suggestion
   9.1 Alleviation of tariff regulations
   9.2 Mitigation of registration

REGIONAL EXPERT CONSULTANCY ON PESTICIDE TRADE AND TARIFF

The I.T.C. (International Trade Centre) based in Geneva is the United Nations Agency specializing in Trade.

I.T.C. is a joint subsidiary organ of GATT and UNCTAD (Un Conference on Trade and Development).

Technical Cooperation Programme

The basic elements of ITC's technical cooperation programme are assistance on: -

- Developing a national trade promotion strategy, including analyzing export potential, choosing priority markets and setting export targets.
- Establishing appropriate government institutions and services such as a central trade promotion organization and services for exporters in trade information, export packaging and export financing
- Finding market opportunities for current export products and using effective marketing techniques to promote them abroad; adapting other products to foreign market requirements and developing new items for export.
- Setting up multinational promotional arrangements for commodities on the world market.
- Training government trade officials, businessmen and instructors in export marketing and trade promotion and establishing a national framework for developing export training over the long term.
- Improving import operations and techniques to optimize scarce foreign exchange resources.

Special Emphasis

In addition to its basic trade promotion activities, ITC's technical cooperation programme is currently focused on several key areas:

- Assisting the least developed countries to improve their trade per-

formance.

- Stimulating the rural growth process through the development of selected rural products for export.
- Cooperating with national chambers of commerce to strengthen their trade promotion programmes.

Most of the specialized activities of ITC are carried out under the auspices of the Technical Division who generally use technical experts for these highly specialized product uses such as Agro-chemicals and Organic chemicals - frequently borrowing experts of specialized market studies each year in non traditional products such as -

- Medicinal plants
- Agricultural Machinery
- Honey, leather goods
- Spices, etc.

The projects selected are usual at the request of the Export Promotion Bureau of the developing countries concerned.

ITC plus country produce identification programmers have concentrated their efforts on non traditional products offering high potential returns with good sources of supply. To-date pesticides have not been identified as priority products except PYRETHRUM.

In 1976, ITC carried out a detailed market survey on behalf of an East African Country and discussions with technical experts in the zone continues.

Recently, ITC have been involved in Pesticides from a Market/Product constraint and project support -

E.g. Medicinal Plants - residues and illegal pesticides practices were included in a series of International seminars.

Agricultural Machinery - Export Opportunities for spraying machines/equipment for pesticides. A series of dissemination seminars is planned by ITC in 1984/85.

A subject of direct interest to this Consultation Seminar is the ITC efforts to improve the import side of foreign trade operations.

Many organizations in developing countries that import Agro-chemicals, in particular fertilizers, have found the need for accurate, relevant and up-to-date infromation for their purchasing operations.

ITC has concentrated on working with Several State Trading Corporations involved in procuring chemical fertilizer.

Finally, ITC has a very successful MARKET NEWS SERVICE which telexes to developing countries relevant trade information weekly.

If enough countries (i.e. this region) requested such information on Agro-chemicals, Pesticides I am sure such a request would be favourably considered by I.T.C.

F. R. PAVEY

WORLD TRADE IN PESTICIDES

The Agrochemical Pesticide market has grown in value terms from a market value of $.85 bn in 1960 to $12.8 bn in 1983.

The major growth has been in Herbicides as illustrated in Chart I.

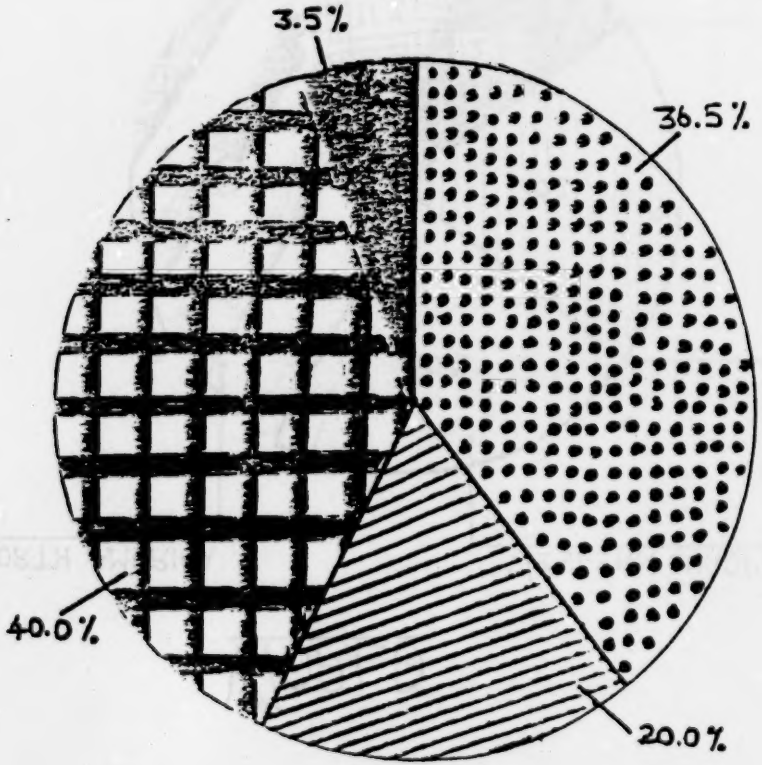
HERBICIDES	38.7%	
INSECTICIDES	33.4%	
FUNGICIDES	22.0%	
OTHERS	5.9%	
TOTAL	100 %	$ 12.8 bn.

The Regional location of Pesticide USE is shown in CHART II.

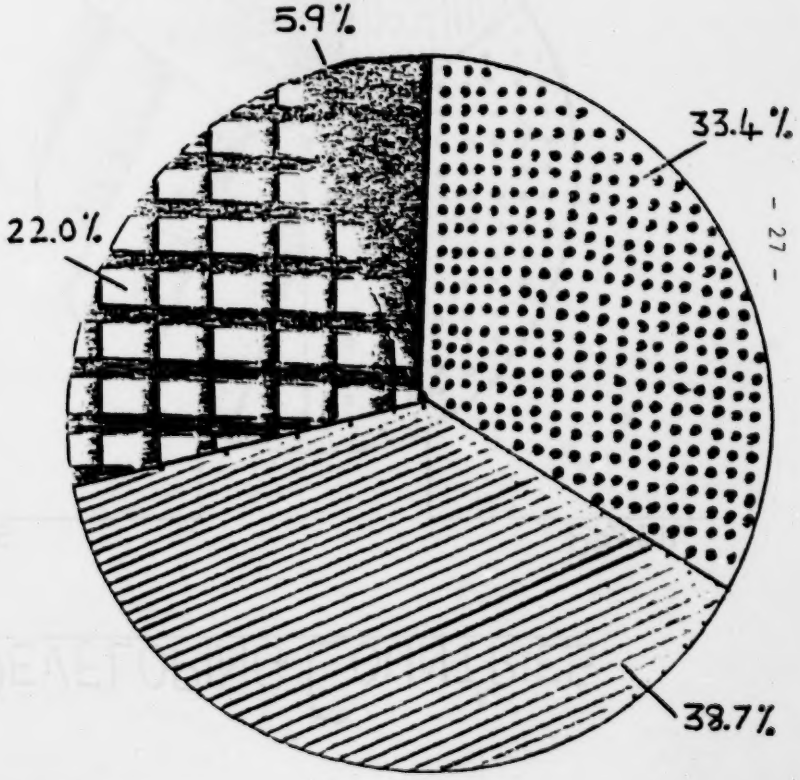
NORTH AMERICA	35%
WESTERN EUROPE	20%
JAPAN	12%
RUSSIA AND EAST EUROPE	11%
DEVELOPING COUNTRIES	20%
AUSTRALIA	2%
TOTAL	100%

AGROCHEMICAL MARKET DEVELOPMENT

1960
MKT. VALUE $0.85 bn

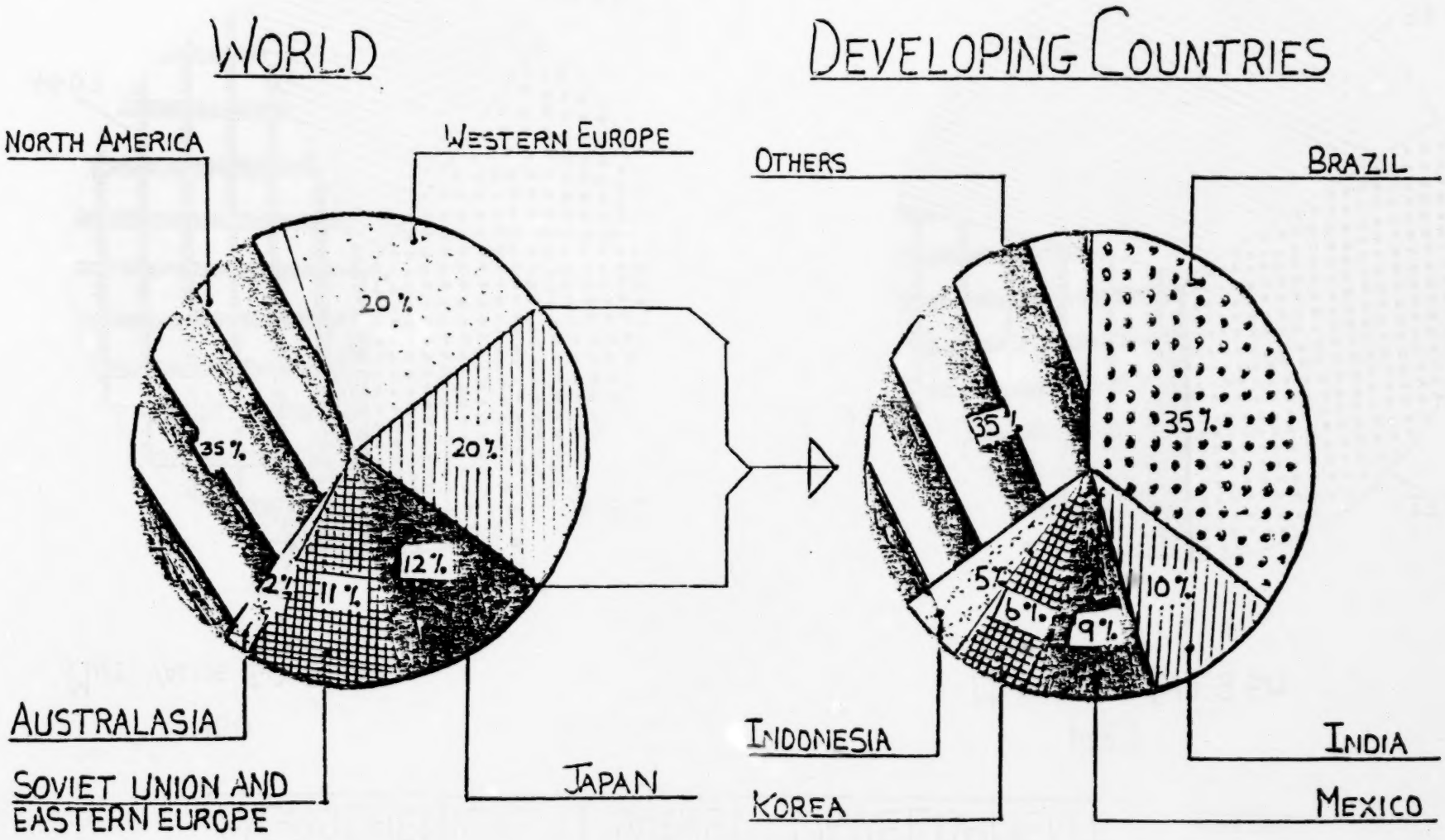


1983
MKT. VALUE $12.8 bn



INSECTICIDES HERBICIDES FUNGICIDES OTHERS

WORLD PESTICIDE MARKET



(US $ 13,000 MILLION END-USER SALES VALUE IN 1971) — EXCLUDING NON CROP OUTLETS.

The 20% of world Trade in the Developing countries section can be further broken down (SEE CHART II)

$2.56 bn	BRAZIL	35%
	INDIA	10%
	MEXICO	9%
	KOREA	6%
	INDONESIA	5%
	ALL OTHERS	35%

The delegates to this Regional Conference will be presenting Pesticide Trade figures for some of the other countries but all developing countries share the common opportunity of potential growth in trade and Pesticide USE at the FARM level. In many of these countries only 15%-20% of major crops are sprayed and in other crops less than 5%.

In the top 3 regions of world pesticide trade 80% - 100% of crops are sprayed with pesticides routinely each year.

World trade in Pesticides has been estimated by wood Mekenzie to expand from 1984 to 1990 by 5% per year. As an example, the fast growing herbicide sector could increase from $ 4.95 m in 1983 to $ 7.10 m in 1990 (AT 1983 $ value) representing 38.4% of the world pesticide trade.

A number of pesticide demand studies are being prepared by official bodies and agencies of the U.N., Major Banks, Regional organizations, and individual countries and industry all of which indicate the growth in different sectors of pesticides to match the Regional National crop and climatic pest conditions.

Example	PAKISTAN	80%	INSECTICIDE MARKET
	NEW ZEALAND	70%	HERBICIDE MARKET.

CHARACTERISTIC OF THE PESTICIDE INDUSTRY

1.A. Research and Technical Industry

a) Heavy Investment in Research and Development each new product cost $ 5-10 m to discover and develop the Industry invests at least 5% of sales in Research and Development.

b) High costs in product promotion and after sales service to ensure correct product use.

APPENDIX 5

REGIONAL NETWORK FOR PRODUCTION, MARKETING AND CONTROL OF PESTICIDES IN ASIA & THE PACIFIC

(A Programme of UNIDO/UNDP)

TRADE & TARIFF IN PESTICIDES

BY

G.S. SANDHU

Director
Ministry of Chemicals & Fertilizers
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TRADE AND TARIFF IN PESTICIDES

INTRODUCTION

The Technical Advisory Committee (TAC) of the RENPAP had recognised that one of the important areas to be covered for achieving the objectives of regional co-ordination in production, marketing and control of pesticides was in relation to trade and tariff as this had important implications for promotion of production and commerce amongst the member countries. The TAC considered this as one of the priority issues which was relevant in the immediate context and gave the activity the status of a sub-network.

2. The working plan envisaged a study tour to assess the trade practices currently in vogue and to evaluate the tariff structures in relation to their impact on intra-regional trade. With this object in view a study tour was undertaken by me in which, due to paucity of time, only 5 countries of the network i.e., Thailand, Philippines, Republic of Korea, Indonesia and Sri Lanka could be covered apart from India. I may mention that I was handicapped on account of the limited time available, the absence of any previous study or report or survey on the subject and due to lack of advance information on the various relevant issues. From the information gathered during the study tour and the discussions held with the network members national co-ordinating bodies, government officials and industry representatives in the countries visited, an attempt has been made to prepare a report which could serve as a background paper for forthcoming consultation.

THE CONCEPT

3. The basis of international trade is that of comparative advantage whereby the resources of a country could be optimally utilised for production of commodities, both for self consumption and export, most advantageous to the country in economic terms with its requirements of other commodities being met through imports from the best sources. The economic policy of developing countries is generally oriented towards achieving self-sufficiency in basic requirements and high priority areas and for import substitution through agricultural and industrial development in such areas. The extent to which this can be achieved, however, is dependant upon a country's financial, technical skilled man power, raw materials, industrial and infrastructural resources. The size of the existing and potential market also is one of the important criteria.

4. Within this overall context, while planning for trade the trade policies of a country are determined by national priorities and moulded by several factors including foreign exchange constraints, trade balances and availability of credit.

5. The absorption capacity for import of a developing country would largely be determined by its capacity to balance trade through matching exports. Keeping in view their requirements and constraints the policy makers would have to decide in simple terms, as to what to import, how much to import, how often to import, how long to continue imports and the most desirable sources of import. The trade in a particular commodity, such as pesticide, has to be considered in relation to the total trade package adopted by a country and is linked in many ways with the development of the indigenous industry.

6. The economies of all the member countries of the network are highly oriented towards agriculture. The use of agro-inputs, therefore, can be said to be a high priority area for every one of them, particularly as increased agricultural production would help in furthering exports of agricultural commodities, which are already amongst the major items of exports of many of the net-work countries, and for certain countries, it would help in achieving self-sufficiency, thereby helping to reduce food imports and releasing corresponding foreign exchange for meeting other national requirements.

THE FRAMEWORK

7. The one major effort made to harmonise international trade is being done through the General Agreement on Tariff and Trade (GATT). Its basic aim is to liberalise world trade and place it in a secure basis thereby contributing to economic growth and development. The main effort of GATT has been to reduce trade barriers and conduct trade without discrimination between nations. Hence the famous 'most favoured nation' clause whereby each party is bound to grant to each other treatment as favourable as given to any other country in the application and administration of import and export duties and charges. GATT further adopted the principle that protection should be given to domestic industry essentially through the customs tariff and not through other commercial measures such as quantitative restrictions except for limited use in balance of payments difficulties. GATT has also attempted binding of the tariff level on a range of products/ commodities so as to encourage a suitable basis for trade. Other important functions of GATT are that it serves as a forum for consultations, discussions and settlements of trade problems between countries.

8. The GATT, however, has recognised the special needs of the developing countries and the necessity for encouraging regional trading arrangements amongst them. In respect of regional trading arrangements the rules are intended to ensure that arrangement facilitate trade among the countries concerned without raising barriers to trade with other members of GATT. Such regional trade groupings may be in the form of customs union or a free trade area. The object is to remove or reduce duties and other barriers within the regional groupings. In a free trade area each member maintains its individual commercial policy, including tariff, towards non members, whereas a customs union adopts a unified customs tariff towards non members, but maintains identical tariffs for trade within the free trade area.

9. With the exception of two, the other countries of the network are already members of GATT. It is felt that in due course of time a regional grouping of the network countries covering a range of commodities including chemicals and agro chemicals could be envisaged within the GATT framework. In fact some efforts such as ASEAN have already been made in this direction, and possibly, its membership could be broadened. It would not, however, be conceivable to have such an arrangement for pesticides alone. Nor, currently, would this be necessary since the present tariff structures are already favourable for trade amongst the network countries and reflect the different stages of development of the pesticides industry in the countries. Instead a more immediate need would be to set up a clearing house facility for exchange of trade information, expertise and technology transfer.

REGULATING AUTHORITY

10. In most of the countries, it was observed, the governmental agricultural authorities are involved in some way or the other with the trade in pesticides. Registration regulations are in all cases implemented through such authority and in many cases import control is also exercised through them in relation to issuing of import permissions and other procedural requirements. Governmental trade or commerce authorities also play an important role and in some cases the predominant role, in laying down policies for regulation of imports. In respect of tariff rates the governmental finance authorities are invariably having a major role. Overall it may be said that the import and tariff control for pesticides is exercised through no single authority but by interaction through a number of government authorities of whom the predominant are agriculture, finance and trade authorities. In this respect it would be useful to identify a nodal agency that can serve as a coordinating body, on a continuing basis, for trade in pesticides.

REGULATION OF TRADE

IMPORT TRADE:

11. There are three main areas of regulation of import trade. These relate to regulation through registration requirements, direct import controls and regulation through tariff impositions. Generally registration of a pesticide is a pre-requisite to import. In some countries, however, where a pesticide has not been covered in the legislative enactment in this behalf, imports of pesticides, excluded therefrom, can take place even without prior registration of that product.

12. Whereas tariff controls as well as registration requirements are prevalent in all the countries, direct import regulation varies

with the stage of development of the local pesticides industry. In countries which rely heavily on imports for meeting their pesticides requirements, direct import regulation is practically absent or minimal. In some others, such as India, extensive direct controls have been introduced.

13. A similar linkage is noticeable in respect of tariff rates. All the countries do recognise the need to calibrating import tariff in such a manner as would give a reasonable degree of protection to the indigenous development of industry though in practice there does not appear to be any clear policy enunciation in this respect in most of the countries. With the exception of one or two countries, however, which have set up basic facilities for manufacture of technical grade pesticides and formulations other countries are either wholly reliant on import of pesticide formulations to meet their requirements or else have nascent formulation facilities for a small proportion of the pesticides being used by them. In this latter group of countries, therefore, the tariff on pesticides imports have been kept at concessional rates. In Indonesia, in addition, government purchases the bulk of the requirements of pesticides and makes them available to the farmer at highly subsidised rates.

14. An attempt is also generally made in most of the countries to allow concessional rates of import duties on raw materials and intermediates and adjuvants used in pesticides vis-a-vis rates applying to chemicals used for other purposes. There is, however, no clear pattern in respect of such raw materials etc. and the policy in this respect is fairly diverse mainly due to the differing levels of development of pesticides manufacturing facilities. The table below gives an indication of the present status of duties levied by different countries:

Country	Formulation	Technical material	Raw materials/ Intermediates	Adjuvants
Thailand	5.5%	5.5%	10%	30% - 33%
Philippines	20%	10%	10%	10% - 30%
Indonesia	6% for Govt. 40% for Pvt.	As on Formulation	2½% (plus 2½% ST on duty paid)	As on Formulation
South Korea	0% on not produced locally	-do-	0 to 20%	-do-
	20% on produced locally also	-do-		
Sri Lanka	5%	7½%	7½%	-
India	100%	100%	131%	131%

15. It is necessary to strike a balance in the concessions granted for import of the finished product and import of technical grade material or raw material, as the case may be, to ensure that there is no disincentive to set up formulating or technical manufacturing facilities. A constant review of the relative tariff rates has, therefore, to be maintained.

EXPORT TRADE:

16. In respect of exports also, by and large, no sophisticated controls are exercised beyong prohibiting exports by those countries which are highly reliant on imports for meeting their requirements and in such countries exports would require a special dispensation. There does not, however, on an overall basis, appear to be any restriction on export of adjuvants and fillers. No particular incentives for exports of pesticides are also available except in a country like India where certain facilities of duty draw back

and some degree of cash incentives as well as import facilities for exporters have been made available. This position reflects the limited stage of development of pesticides industry in most of the countries.

17. From among the network countries currently exports are taking place only from India and Korea but only a portion of their export is to the network countries. One inhibiting factor could be a preference for branded products which results in the importer countries meeting their major requirements from developed countries. It would be worthwhile for such countries to try out the products available from amongst the network countries even by giving preference, at least for trial purposes initially.

18. There is need also for a greater exchange of information through a clearing house and dissemination of such information on import requirements and export potentials to National Coordinating bodies and Pesticides Associations of the network countries.

NON TARIFF FACTORS

PESTICIDE REGISTRATION:

19. Almost all the countries of the region follow a certain procedure of registering pesticides, only on the basis of which the registered pesticides are allowed for use in agriculture or public health. Each country of the region, however, has its own systems of registration. In some countries very elaborate standards have been set, which require submission of detailed toxicology and bio-efficacy data, whereas in others the conditions of registration of pesticides are not so stringent.

20. It is an established fact that none of the countries of the region provide that in case a given product is registered in one of the countries of the region, it would be granted automatic registration in the other. This is a major inhibiting factor for increased pesticide trade in the region. Adoption of a harmonised system of registration and allowing the use of bio-efficacy data generated in similar agro-climatic conditions would help to enhance trade within the region. In fact, there is a need to expeditiously implement the recommendations of the consultation on harmonisation of pesticide registration requirements held at Baguio City in October, 1983.

DATA AVAILABILITY:

21. There is a distinct lack of information on the requirements of the importing countries of the region and the availability of exportable surplus of the producing countries. In other words, there exists a severe data gap as to the knowledge of requirements of one country on the one hand, and whether the same could be made available by another country within the region, on the other. It, therefore, becomes essential that the scheme of data collection that was adopted in the Experts Group Meeting on the Pesticide Data Collection System, held in Chiangmai, Thailand in March, 1983 be vigorously pursued and regular exchange of this information encouraged.

CREDIT AND FINANCE:

22. There does not appear to be any special schemes of financing of credit between the countries of the region for increasing trade in pesticides. It may be worthwhile for countries who have the capability of exporting the pesticides and/or the technology for their basic manufacture and formulations to open up special credit loans to the importer countries, which would provide a lot of incentive to increased trade in pesticides within the countries of the region.

GENERAL

23. All the countries of the region have given high priority to promote the use of pesticides in agriculture and public health, and barring one or two countries, hardly levy import duty or taxes on them. It can, therefore, be safely assumed that in due course of time, pesticides consumption in countries where it is presently low would increase to a level which would warrant higher trade in pesticides and, perhaps, building up of local formulations and technical grade manufacturing facilities.

24. It is, therefore, an appropriate opportunity to work towards the goal of removing the trade barriers within the countries of the region, in order to promote intra-regional trade.

CONCLUSIONS & OBSERVATIONS

25. A greater communication within the countries of the region is essential on the subject of supply and demand of product-wise pesticides that can be imported-exported by the concerned countries. It becomes, therefore, imperative that the countries of the Network communicate the actual information as required under the data collection scheme of the region to the Regional Coordinator's office in time every year. The Regional Coordinator's Office, in turn, should systematically collate the data from the various countries and arrange to transmit it to all the countries of the region so that importers can become aware of possible sources from the exporting countries and vice versa.

26. It is also recommended that the collated data be circulated by the Regional Coordinator to the various national pesticide industries associations with the request that they should convey the data to their members who can initiate bigger trade within the region. This would enable directed effort by the exporter countries to the potential importing countries.

27. While greater dissemination of information on data collection would help in trade of commodities, similarly, the Pesticide Development Programme of UNIDO/UNDP for development of pesticides technology can be nominated as a clearing house for transfer of technology and expertise in the field of pesticides within the region. The Pesticides Development Programme could act as a clearing house, with whom countries who can offer technology, know how and engineering skills could register themselves. The PDP can then circulate this information to all countries of the Network. In case any of the countries have interest to establish pesticide units either for formulations or active ingredients, PDP could assist them to locate appropriate technology based on the available information with them, as also provide all necessary technical assistance for such purpose.

28. In respect of tariff barriers it may be stated that not much change in the customs duty tariffs is presently called for in view of the insignificant import duties on pesticides being levied in most of the countries of the region. However, considering the potential for trade within the region, in a number of commodities including pesticides, the member countries may consider evolving a perspective plan for greater co-operation in trade.

29. In certain countries of the region in certain cases the import duties on raw materials required for pesticide formulations, and raw materials and intermediates required for manufacture of

technical grade pesticides are liable for higher import customs duty than the finished formulation or technical grade pesticide respectively. This anomaly appears to discourage the increase in installation of pesticide formulations unit in such countries as also causes undesirable higher prices in the manufacture of technical grade pesticides. It is recommended that such anomalies should be rectified, to the extent feasible, by reducing duties on such inputs to a level below that prevailing for the finished product.

30. It was also observed that in certain cases the prices of certain popular branded products appear to be on the higher side when compared to the product being manufactured by other companies, which was not in the interest of the farmer. The countries of the region may like to consider imports of identical products under common names or of lesser known brands. In any case, it would be helpful for the importing countries to obtain information on prices, quality and packings of some of the commonly used products for comparing them with the same branded products, in order to have greater competitiveness for the benefit of the end-users.

31. With a view to giving an impetus to intra-regional trade it would be desirable for countries of the region giving preference to purchase of their pesticides requirements, both in terms of commodities and technologies, to other countries of the region by invariably giving an opportunity to such countries to compete with proposals or offers received from other sources.

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PESTICIDES TARIFF STRUCTURE

	Articles	Year- 1984 Philippines		1982-1983 Korea		1983-1984 Sri Lanka	
		Heading No.	Rate of Duty	Heading No.	Rate of Duty	Heading No.	Rate of Duty
I. Finished Product	Insecticides	38.11 210	50%	38.11	20%	38.11	5%
		290	20%				
Raw Materials	Dichlorodiphenyl Trichloroethane (DDT)	29.02 900	10%	29.02	20%	29.02	7.5%
	Benzene hexachloride (BHC)	29.02 900	10%	29.02	20%	29.02	7.5%
	Pyrethrum	12.07 000	20%	12.07	20%	12.07	35%
	Heptachlor	29.02 900	10%	29.02	20%	29.02	7.5%
	Monochrotophos	29.19 000	10%	29.02	20%	29.19	7.5%
	Xylole (solvent)	27.07 300	10%	27.07	10%	27.07	7.5%
	Wetting agent	34.02 000	30%	34.02	30%	34.02	7.5%
	Clay	25.07 000	10%	25.07	10%	25.07	7.5%
	Starch	35.05 000	20%	35.05	30%	35.05	60%
II. Finished Product	Herbicides	38.11 400	20%	38.11	20%	38.11	5%
Raw	Monosodium Methyl Arsonate	29.34 000	10%	29.34	20%	29.34	7.5%
	Butachlor	29.25 900	10%	29.34	20%	29.34	7.5%
	2,4-dichlorophenoxy acetic acid	29.16 000	10%	29.16	20%	29.16	7.5%
	Xylole (solvent)	27.02 300	10%	27.07	10%	27.07	7.5%
	Wetting agent	34.02 000	30%	34.02	30%	34.02	7.5%
	Clay	25.07 000	10%	25.07	10%	25.07	7.5%
III Finished Product	Fungicide	38.11 300	20%	38.11	20%	38.11	5%
Raw	Pentachloronitrobenzene	29.03 000	10%	29.03	20%	29.03	7.5%
	Pentachlorophenylaurate	29.14 900	10%	29.14	20%	29.14	7.5%
Materials	Xylole (solvent)	27.07 300	10%	27.07	10%	27.07	7.5%
	Wetting agent	34.02 000	30%	34.02	30%	34.02	7.5%

1979-1980 Pakistan		1979-1980 India		1979-1980 Thailand		1979-1980 Indonesia	
Heading No.	Rate of Duty	Heading No.	Rate of Duty	Heading No.	Rate of Duty	Heading No.	Rate of Duty
38.11	Free	38.41/19	60%	38.11	5%	38.11	40%
29.02	40%	29.01/45(12)	60%	29.02	30%	29.02 (15)	2½%
29.02	40%	29.01/45(12)	60%	29.02	30%	29.02 (15)	2½%
12.07	55%	12.07	60%	12.07	Free	12.07	30%
29.02	40%	29.01/45(12)	60%	29.02	30%	29.02 (15)	2½%
29.19	40%	29.01/45(12)	60%	29.19	30%	29.19 (15)	2½%
27.07	35%	27.07	40%	27.07	30%	27.07 (30)	10%
34.02	40%	34.01/07	60%	34.02	30%/6.00/kg.	34.02 (20)	10%
25.07	40%	25.01/32	60%	25.07	10%	25.07	15%
35.05	85%	35.01/07	60%	35.05	30%	35.05 (10)	2½%
38.11	Free	38,01/19	60%	38.11	5%	38.11	40%
29.34	40%	29.01/45(12)	60%	29.34	30%	29.34 (20)	2½%
29.25	40%	29.01/45	60%	29.25	30%	29.25 (20)	2½%
29.16	40%	29.01/45(12)	60%	29.16	30%	29.16 900 (10)	5%
27.02	35%	27.07	40%	27.07	30%	27.07 300 (30)	10%
34.02	40%	34.01/07	(50) 60%	34.02	30%/6.00/kg.	34.02 (20)	10%
25.07	40%	25.01/32	60%	25.07	10%	25.07	15%
38.11	Free	38.01/19	60%	38.11	5%	38.11	40%
29.03	40%	29.01/45(12)	60%	29.03	30%	29.03 (15)	2½%
29.14	40%	29.01/45(12)	60%	29.14	30%	29.14 (15)	2½%
27.07	35%	27.07	40%	27.07	30%	27.07 300 (30)	10%
34.02	40%	34.01/07	(50)60%	34.02	30%/6.00/kg.	34.02 (20)	10%